

Medical Director V3 – Inactivate Patients

If a patient hasn't visited the clinic for a number of years (say 3 or 4) it is best to make them inactive, so they do not affect statistics and accurate data retrieval. You can do this opportunistically, but once a year you should also do a database search for those patients who haven't presented in the last x number of years¹. Undertaking a regular review will greatly assist to maintain a quality database.

Inactivating patients will hide patients from view and from standard patient searches. You will still have access to a patient's clinical data. You might select this option if a patient has moved away from your surgery, for example. Patients marked in this way can easily be reactivated.

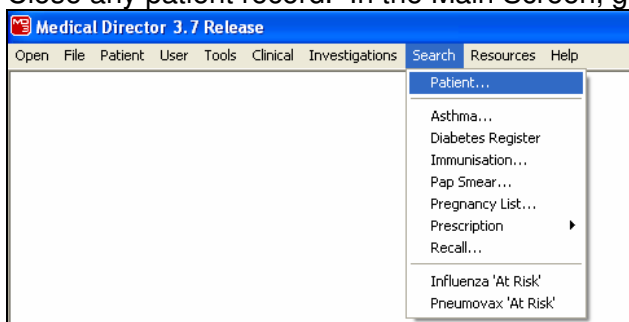
MD3 (version 3.7 onwards) has the ability to bulk inactivate patients in one simple step. No patients will be permanently deleted in this process.

Please Note:

- Back-up your current data before running this utility.
- Remove "outstanding actions" if not part of the recall system being used.
- Delete old recalls – begin by choosing a date range of 3-6 years previous. (Remember, a practice decision needs to be made as to what actions are taken on these particular items.)

How to do it:

1. Close any patient record. In the Main Screen, go to **Search** and select **Patient**.



2. The 'Patient Search' window appears.

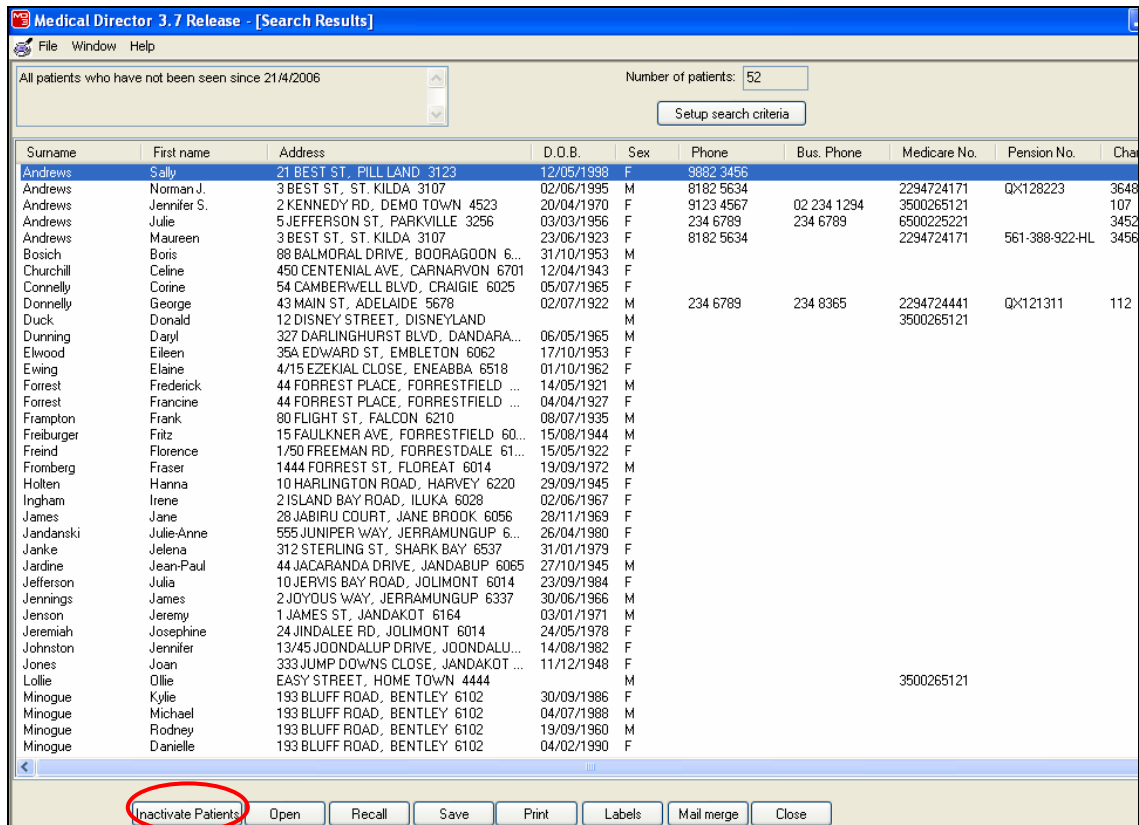
- Tick **Not seen since** and **enter the relevant time period** (eg. 3 years from today's date).
- Click on the **Search** button.

The screenshot shows the 'Patient Search' dialog box with the following settings:

- Age:** Age greater than or equal to: [], Age less than or equal to: []
- Sex:** All, Female, Male
- Pregnant:** Yes, No, All
- ATSI:** Aboriginal, Torres Strait Islander, Aboriginal and Torres Strait Islander
- Smoker:** Smoker >= [] /day, Never Smoked, Ex-Smoker
- Occupation:** [] Other demographic criteria
- Drug/Condition:** Currently taking drug, Currently taking drug from class, Previous script for drug, Condition, Symptom, Sign
- Other criteria:** OR, NOT, Add to search criteria
- Seen By:** Any doctor, From: 21/4/2008, To: 21/4/2008
- Not seen since:** Not seen since, 21/4/2006
- Custom Fields:** Custom Field 1, Custom Field 2, Custom Field 3
- Search:** Search, Clear, Close

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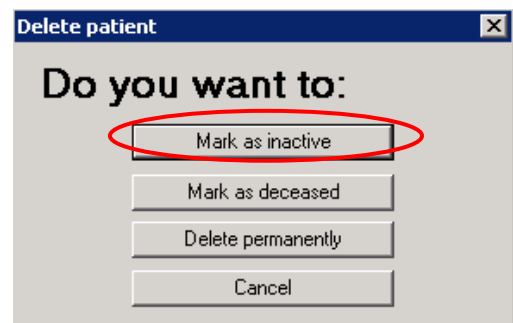
- A list of patients will appear. Click on **inactivate patients** to inactivate all patients at once. A box will appear asking you to confirm. Note this action is only available if you have used the “Not seen since” search criteria.



How to inactivate patients individually

If you are notified that a patient is no longer at your Practice, then you can inactivate patients individually.

- From the **Main Screen**, call up the identified patient needing to be inactivated (F2).
- Click on the **Delete** button.
- The 'Delete Patient' window appears. Click the **Mark as Inactive** button. The patient record will be removed from the list.



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How to activate inactive Patients

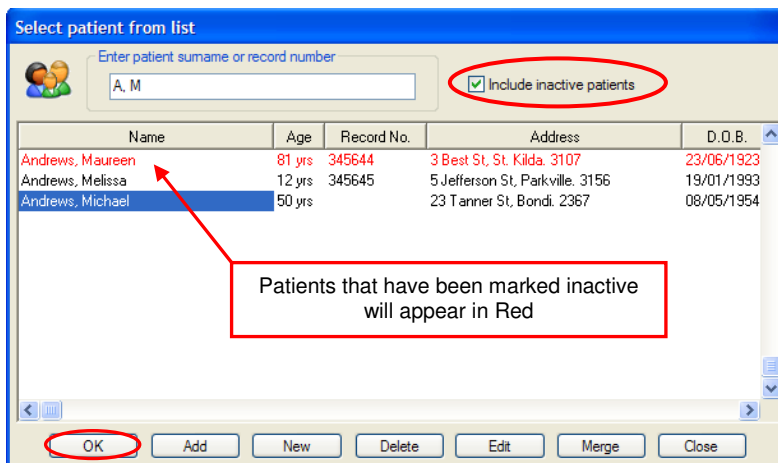
If a patient calls the practice and they do not appear to be on the database, ask them if they have attended before.

If they say 'Yes'
Tick the **Include inactive patients**.

Patients that have been marked as inactive will appear in Red.

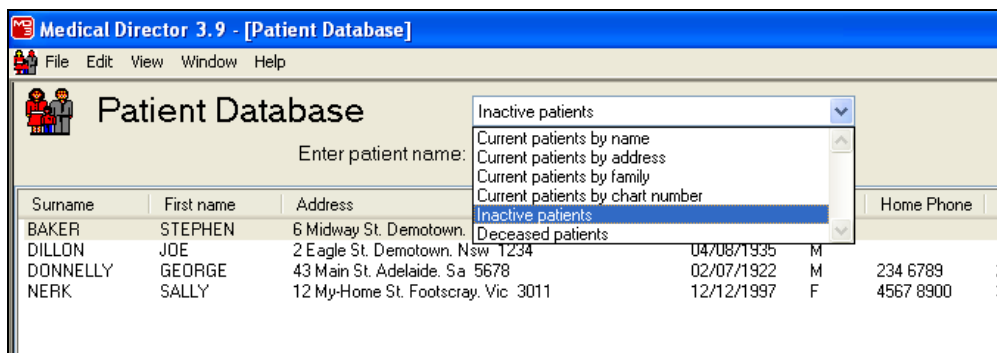
Select the required inactive patient and press **OK**.

Opening the patient record automatically flags the record as 'active'.



To View Inactive Patients

From the Main Menu, go to **List** and select **Patient Database (F10)**. The 'Patient Database' window will appear. Using the drop-down menu at the top of the Patient Database window, select **Inactive Patients**.



This screen may also be utilised to reactivate patients.

Highlight the patient in question and click the **Retrieve** button. Note that the retrieve button is only available when viewing inactive patients.

Note: Utilise Medical Director Help Menu to search further information.
Help → Medical Director → Search → Type 'Inactive Patients' → 'Display' → 'Select 'Patient Search' and 'Flagging Patients as Inactive'.

This document has been created by SEA-GP (Brisbane) using screen shots and content from Medical Director Program.

Disclaimer: Whilst every effort is made to ensure accuracy, SEA-GP (Brisbane) does not accept any liability for any injury, loss or damage incurred by or reliance on the information contained within this information sheet.

¹ Medical Director – “Clean up your act!! – A guide to recording accurate information and “cleaning up” those areas of past neglect. Noel Stewart, North East Valley Division of General Practice (April 2008)